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ABSTRACT

This report is the result of an initial review of training needs which was carried out within training institutions, libraries, and archives to collect representative information on those needs in terms of current practices in library and archive education programs, as well as in institutions employing librarians, archivists, and conservators. Two questionnaires were issued to selected institutions to: (1) find out whether preservation and conservation are mentioned in courses offered; and (2) collect data on the total numbers of staff, preservation facilities and equipment, policies and practices, and training needs as assessed by these institutions. Survey questionnaires were sent to 135 institutions world-wide (excluding the United Kingdom and North America); 52 questionnaires were returned from 42 countries, representing a 39% rate of return. This report presents the results of the surveys of both training institutions and libraries and archives. For training institutions, the discussion focuses on courses and modules, including core and optional modules; the topics covered; practical work; and the teaching staff. For libraries and archives, discussion focuses on facilities, threats to the collections, conservation units, binderies, and reprographic units, as well as policies, practices, problems, and issues related to staff training, and ways in which these institutions envisage training. Copies of the two questionnaires are appended. (SD)

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Review of training needs in preservation and conservation

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REVIEW OF TRAINING NEEDS IN PRESERVATION AND CONSERVATION

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General Information Programme and UNISIST

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PREFACE

In order to assist in meeting the needs of Member States, particularly developing countries, in the specialized areas of Archives Administration and Records Management, the Division of the General Information Programme has developed a long-term Records and Archives Management Programme - RAMP.

The basic elements of RAMP reflect and contribute to the overall themes of the General Information Programme. RAMP thus includes projects, studies and other activities intented to :

- develop standards, rules, methods and other normative tools for the processing and transfer of specialized information and the creation of compatible information systems ;

- enable developing countries to set up their own data bases and to have access to those now in existence throughout the world, so as to increase the exchange and flow of information through the application of modern technologies ;

- promote the development of specialized regional information networks ;

- contribute to the harmonious development of compatible international information services and systems ;

- set up national information systems and improve the various components of these systems ;

- formulate development policies and plans in this field ;

- train information specialists and users and develop the national and regional potential for education and training in the information sciences, library science and archives administration.

One of the main points to emerge from the world survey on preservation and conservation (UNESCO/CIA/IFLA, 1986) is the necessity for an appraisal of the needs in education and training in this field.

This text is the result of a review carried out within training institutions, libraries and archives; policies and practices within the library, problems of staff training and the way in which institutions envisage this training, are also covered in this text.

Comments and suggestions regarding this text are welcomed and should be addressed to the Division of the General Inofrmation Programme, UNESCO, 7, Place de Fontenoy, 75700 PARIS, France. Other studies prepared as part of the RAMP programme may also be obtained at the same address.

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INTRODUCTION

1. In 1986 in response to growing concern over the preservation and conservation of library and archive documents over the world, UNESCO supported a survey jointly undertaken by IFLA and the ICA to assess the actual state of the world's patrimony. The results of this survey were outlined and a report published in 1987 (1) clearly demonstrated the large scale of the problem and recognised the key part that education and training play because the development of preservation and conservation policies and programmes is dependent on the availability of trained professional and technical staff to direct, control and undertake such work.

2. Preservation is defined as including :

(a) the planning and policy making functions
(b) the development and application of preservation methods to minimise the effects of those factors that result in the deterioration of library and archive materials, and
(c) the treatment of carriers of information including restoration, conservation and substitution

3. Education and training are seen as required at several levels :

(a) the training needs of professional staff in libraries and archives ranging from basic applications through to the needs of managers who have to deal with preservation problems as part of their daily work to the specialised needs of those who have to organise and operate preservation programmes
(b) the training needs of the conservators and supporting technicians who apply the appropriate treatments to the various carriers of information

(c) the training needs of non-professional staff working in libraries and archives who require an appreciation of good housekeeping practices

(d) the problems of training those educators who will be providing the wide range of education and training facilities required to meet the above needs

4. UNESCO funded a project to undertake an initial review of training needs for the different levels identified above in a selected sample of countries and to collect representative information on those needs both in terms of current practices in library and archive schools, and in institutions employing librarians and archivists as well as conservators. (UNESCO contract 400423.7).

METHODOLOGY

5. The project primarily involved the collection of representative information in terms of current practices in library and archive schools and in libraries and archives themselves by the use of two separate questionnaires.

6. The questionnaire to institutions offering courses to librarians and/or archivists sought information on whether preservation and conservation were mentioned in the courses provided and if so whether at under-graduate or post-graduate level and whether within compulsory or optional modules. Information was also requested on the amount of time devoted to preservation in such courses, the content of the courses, the facilities and staff availability and their plans for the future. A copy of the questionnaire for educational institutions teaching librarians and/or archivists is shown at Annex A.

7. A separate questionnaire was issued to selected libraries and archives seeking information on the total numbers of staff employed, the preservation and conservation facilities and equipment already possessed by the institutions, the policies and practices within the library or archive, and the training needs as seen by these institutions. A copy of this questionnaire for libraries and archives is shown at Annex B.

FINDINGS : SURVEY OF TRAINING INSTITUTIONS

RESPONSE RATE

8. Copies of the questionnaires were sent to 135 institutions world-wide but excluding the United Kingdon and North America for which separate studies have been undertaken. 52 questionnaires were returned from 42 countries representing a 39% response rate as follows :

Europe	16 responses
Africa	11 responses
Arab world and Middle East	6 responses
Asia and Far East	9 responses
Caribbean and Latin America	4 responses
Australasia and Pacific	6 responses
	52

COURSES AND MODULES

9. Of the 52 schools replying 47 (90%) were providing courses for librarians and 18 (35%) courses for archivists (see Tables 1 & 2). Between them these schools provided details on a total of 71 different courses for librarians (39 for under-graduates and 32 for

post-graduates) and 23 different courses for archivists (12 for under-graduates and 11 for post-graduates). In total details of 94 different courses were provided. Out of these 94 courses 79 (84%) contained some mention of preservation and conservation as defined in the questionnaire with a significant imbalance between the emphasis in courses for archivists where 95% included preservation and conservation to some degree (100% of under-graduate and 90% of post-graduate courses) and those courses for librarians where 80% included preservation and conservation (84% of under-graduate courses and 75% of post-graduate courses).

10. As regards the importance attached to preservation and conservation, it was encouraging to note that nearly 58 out of a total of 94 courses or some 62% treated preservation and conservation within a core or compulsory module. Once again however archive courses were significantly in advance of librarianship courses with 78% of archive courses mentioning preservation and conservation within a core or compulsory module compared with 58% of librarianship courses (see tables 1 & 2).

11. In response to a request for the name of the core module (question 5.1.) within which preservation and conservation were included the name of the module varied considerably. They, however, almost equally divided between core modules concerned with (a) library or archive management (b) courses which appeared to be general introductions to librarianship, archives, bibliography or information, and (c) courses explicitly described as being concerned with preservation, conservation and reprography.

LIBRARIANSHIP COURSES AND INCLUSION OF PRESERVATION AND CONSERVATION

Question 3	UNDER-GRADUATE	POST-GRADUATE
Total number of courses	39	32
Number of courses mentioning Preservation/ Conservation	33 (84%)	24 (75%)

Question 4	UNDER-GRADUATE	POST-GRADUATE
Total number of modules mentioning Preservation/ Conservation	36	28
Core Modules	25 (69.5%)	15 (53.5%)
Optional Modules	11 (30.5%)	13 (46.5%)
	(3 courses offered both core and optional modules)	(4 courses offered both core and optional modules)

TABLE 2

ARCHIVE COURSES AND INCLUSION OF PRESERVATION AND CONSERVATION

Question 3	UNDER-GRADUATE	POST-GRADUATE
Total number of courses	12	11
Number of courses mentioning Preservation/ Conservation	12 (100%)	10 (90%)

Question 4	UNDER-GRADUATE	POST-GRADUATE
Total number of Modules mentioning Preservation/ Conservation	15	12
Core Modules	9 (60%)	9 (75%)
Optional Modules	6 (40%)	3 (25%)
	(3 courses offered Core and Optional Modules)	(2 courses offered both Core and Optional Modules)

CORE MODULES

12. The amount of time devoted to preservation and conservation studies in core modules (question 5.2.) also varied considerably and was obviously closely related to the range of topics offered and the level of treatment given to the topic. Out of a total of 58 core modules that mentioned preservation and conservation only 24 gave details of the time devoted to preservation and conservation. Of these 24 core modules, 15 or 62% allocated less than 10 hours to preservation and conservation and where schools in this group also indicated the content of the modules, this was largely confined to general overviews and "consciousness raising". Two courses reported allocating betwen 12 and 15 hours. Five courses reported spending between 25 and 40 hours (2 European, 2 West African, 1 Australian) in each case devoting a proportion of this time to instruction in practical repair and conservation. The two courses which reported the highest number of hours were offered by (a) the Universidad Nacional Mayor de San Marcos, Lima with 68 hours in an under-graduate course for librarians containing a large proportion of practical training and (b) by the Kenya Polytechnic, Nairobi; with 5 hours per week for 39 weeks in conservation and reprographic techniques for non-graduate archivists. It should be remembered that in a number of countries, practical training in conservation and reprographic techniques is provided in separate schools for conservators or technicians rather than as part of courses for librarians and archivists.

OPTIONAL MODULES

13. Optional modules mentioning preservation were offered by 33 out of the 94 courses (7 library courses and 5 archive courses offered coverage in both core and optional modules). Following a very similar pattern (question 6.1.) to that noted for core modules (a) about one third of these modules were specifically titled as being solely concerned with preservation and conservation (b) some were in courses devoted to "Special materials" or "Audio-visual materials" and (c) about one quarter were options labelled as "Archival" offered within courses specifically directed at librarians. This once again demonstrates the view of preservation as being more particularly associated with archival rather than with library practice. Of these 33 optional modules 18 reported on the time allocated to preservation (question 6.2.) showing, as might be expected, on average a greater number of hours than in the case of core modules with 55% of the modules devoting more than 22 hours to preservation and conservation.

TOPICS

14. Very few courses reported many details about the actual topics offered in their conservation modules. From those who did give information there appeared to be an emphasis on preservation and conservation, environmental control, disaster preparedness and the use of microforms. Those courses giving more substantial time to conservation were offering students practice in simple treatments and repairs. Only two courses specifically reported attention to the preservation of non-book materials such as audio-visual items and magnetic media.

PRACTICAL WORK

15. Only 15 courses out of the 94 or 16% reported that practical work of some description was undertaken (question 5.5. and 6.5.) Only two schools reported having laboratory facilities directly and continuously available to them. On the other hand 29 courses or 31% arranged visits to binderies or workshops usually of the parent or neighbouring institutions (question 5.6. or 6.6.).

TEACHING STAFF

16. Regarding the numbers of staff available to teach the courses, 35 schools reported having staff members involved in teaching of preservation and conservation, 15 schools had 1 full-time member of staff involved, 14 schools had 2 full-time members involved and 4 schools had 3 full-time members. The remaining 2 schools each had 1 part-time member of staff involved in teaching these topics (question 7). 21 schools reported the use of outside speakers either to teach at the school or for demonstrating practices at their own place of work (question 10.). Virtually no research was reported by members of staff in the areas of preservation and conservation (question 8.) with the exception of the University of Ibadan, Nigeria. In only 9 cases were staff reported as being involved as providers or organisers of short courses or conferences on preservation and conservation (question 11.). However a further 20 cases were reported where staff had participated as members of the audience in short courses or had attended conferences on preservation. Some 6 schools reported that students had undertaken assignments or dissertations of some substance on topics related to preservation.

17. With regard to future requirements (questions 12. and 13.) several schools expressed optimism that they might be able to give

increased attention to preservation in the future. 32 institutions (61%) said they had staff with some knowledge of preservation who could participate in any new or expanded programme. When asked about what further training they would like for their staff, the greatest emphasis was on the need for short intensive courses of which 3-6 months was the favoured duration, and for exposure to techniques and policies by attachment to established conservation departments. In the case of schools outside Europe and Australia, it was particularly emphasized that any such training and experience by attachment would have to be acquired outside the country in which the school was housed.

FINDINGS : SURVEY OF LIBRARIES AND ARCHIVES

RESPONSE RATE

18. A questionnaire was circulated to 227 institutions, principally in the developing world, with a small sample of institutions in the countries of Eastern and Southern Europe. Replies were received from 78 institutions (34%) in 58 countries. One third of the countries represented were in Africa, with the majority of the others being in the Far East, Pacific and Caribbean. Two East European countries and three countries from Southern Europe were also represented.

Europe	7 responses
Africa	23
Arab world and Middle East	5
Asia and Far East	21
Caribbean and Latin America	16
Pacific	6
	78

FACILITIES

General

19. It is important to know exactly what facilities and equipment institutions already possess, and what their attitude to preservation generally is, before considering the future training needs of staff.

Buildings

20. More than 80% of the libraries in the survey were housed in purpose-built accommodation (question 26) Most of those libraries which did not have purpose-built accommodation were housed in converted offices or schools. This was also true for archives but the percentage of archives housed in purpose-built accommodation was much lower - only 56%.

21. Fewer archives were air-conditioned than libraries (question 27) 58% of archives compared with 73% of libraries. Only half of these libraries and archives, however, had their air conditioning working continuously.

22. The relatively poor facilities of archives were compensated for by the higher number with plans for improving or re-building their facilities (question 29) 73% of archives claimed to have plans for new facilities, and a third of these had plans to build new accommodation. A significantly smaller number, 46% of libraries claimed to have plans, and most of these plans were for extending or improving the present facilities.

Threats to Collections

23. Both libraries and archives perceived the greatest threat to their collections as high usage, and the high temperature and humidity of their storage areas (question 28) This indicated a level of awareness of the causes of deterioration in documents.

Conservation Units

24. There was a noteable difference in the survey between the numbers of libraries and archives with conservation units (question 30). Most archives (64%) had a specialist unit, while only 42% of libraries did. The vast majority of these units had adequate work surfaces and water supplies.

25. The equipment available in conservation units is indicated in Table 3. The units in archives were better equipped than those in libraries. There was also evidence of a wider variety of technical processes being carried out in archives.

26. Most libraries and archives were not, however, satisfied with their existing equipment but there was little indication whether this was due to the amount of equipment available, or the obsolescence of existing machinery.

27. Many more archives had facilities for laboratory testing than libraries; 60% of archives compared with 37% of libraries. This figure tallies with the higher number of archives with an in-house conservation unit.

28. The volume of repairs in conservation units was predictably higher in archives than libraries. Archives repaired on average 3,600 volumes and 23,000 documents a year; although this figure is distorted by the Soviet Union's massive figure of 160,000 documents

Table showing the degree of availability and the purchase priority in obtaining selected conservation equipment.

TABLE 3

	degree of availability		purchase priority	
Equipment	Archives	Libraries	Archives	Libraries
Fumigation Cupboard				
laminating machine				
presses/binding equipment				
deacidification equipment				
pH measuring equipment				
humidity chamber				
physical strength test eqpt.				
cutting equipment				
microscopes				
photographic eqpt.				
microfilm camera				
magnifying eqpt.				
heaters				
processors (starch, etc.)				
microfilm processing eqpt.				
leafcasting equipment				
chemistry equipment				
vacuum table				
cold steam humidifying chamber				
sewing machine				
washing/drying facilities				

lesser greater

repaired each year by the Central Archival Administration, and by several other large-scale repairers. Libraries repaired, on average, 1,500 volumes and 4,500 documents.

Binderies

29. Most of the libraries and archives in the survey had a bindery (question 31) and 60% of the institutions surveyed claimed to have adequate equipment in their bindery. A minority of libraries (26%) used off-site bindery facilities, but a higher number of archives (43%) also claimed to use such facilities. The vast majority of these libraries and archives were using outside binders to supplement the output of their own bindery.

30. Only a small number of binderies said their equipment was inadequate and specified the pieces of machinery or tools they would like to obtain. The most popular item with archives was a laminating machine. Many library binderies also claimed to be in need of a greater amount of basic binding equipment.

31. The output of binderies varied enormously. The average annual output of a library bindery in the survey (7,088 volumes) was much greater than the average for archives, which was 2,115 volumes. This result was predictable, since one would expect the work carried out in archive binderies to be on a small scale, and more document based.

32. The survey also highlighted the disturbing statistic that 50% of archives and 40% of libraries reported having difficulty obtaining supplies and spare parts. There seemed to be no obvious links between countries experiencing such difficulties. In some cases, (Syria and Jordan) war and politics probably played some part. In other cases, such as Africa, Asia and Latin America, currency problems and import restrictions could be factors. The

countries having difficulties with bindery supplies, also reported having problems obtaining specialist and archivally 'safe' materials for conservation work. This reinforced the findings of the previous UNESCO funded world survey (1).

Reprographic Units

33. A high number of archives and libraries (61% and 60% respectively) claimed to have a photographic unit in their institution (question 32) but only half of these expressed satisfaction with their existing equipment. 36% of archives and 43% of libraries used processing facilities elsewhere.

34. The output of in-house microphotographic units was very variable. In the case of libraries the range of figures was from one to two rolls a month to a few hundred. The average was 55 rolls a month. Archives had a slightly lower average (49 rolls); but there was a smaller range of output figures.

POLICIES AND PRACTICES WITHIN THE LIBRARY

Budgets and Needs

35. The survey showed that the average percentage of the budget spent on preservation and binding was 17% for archives and 9.3% for libraries (question 4) but the proportion of this amount which was spent on binding alone is unknown.

36. The proportion of the budget spent on binding and preservation was largely unrelated to the size of the preservation problem within an institution; if anything, those with the biggest budget percentages seemed to have the smallest problems. The figures returned by the libraries in the survey suggested that they expected their

preservation problems to be greater in 5 and 20 years' time than presently (question 3). Archives, on the other hand saw their problems as being greatest presently, and likely to diminish in future years. These different perceptions can be ascribed either to the greater knowledge of and confidence in conservation within the archive community; or to the predominantly modern (twentieth century) holdings of the libraries in these countries.

Non-print Media

37. The survey also indicated that only a minority of libraries (about 30%) paid any attention to non-print media (question 5). The percentage of archives taking special care of such materials was even smaller. This is probably because there is little representation of these materials in collections. It is certainly an area in which awareness and knowledge can be easily increased.

Housekeeping

38. The results of the survey thus far suggest that archives were better provided with conservation facilities than libraries. Where good housekeeping practices were concerned (question 6) archives more regularly undertook fumigation of their collections, concerned themselves with environmental control and tried to educate their users. Libraries more frequently carried out minor interventions such as cleaning, furbishing and boxing.

Housekeeping activity	Archives	Libraries
No treatment of any kind	11%	11%
Fumigation	20%	13%
Environmental controls	27%	15%
Cleaning, dusting, furbishing	20%	40%
Boxing, enveloping, minor repairs	11%	14%
Education for users	11%	7%
	100%	100%

Disaster Plans

39. Disaster plans were a comparative rarity in both sectors (question 7) with only 39% of libraries and 33% of archives claiming to have a suitable plan.

National Preservation Policies

40. Only 15 countries from the 58 surveyed (25%) had a national preservation policy (question 8). Most of those given as examples by institutions in the survey were actually laws and decrees relating specifically to archival materials, rather than books and printed material.

STAFF

Professional staff

41. The survey found that the average percentage of staff in libraries with a knowledge of preservation issues and practices was small - less than 10% (question 9). The average for archives was higher - 14% - yet large regional fluctuations were apparent. These differences were so large (from 2% to 40% and 49%) that they called into question the interpretation of the questionnaire's phrase 'knowledge of preservation issues and practices'.

42. Most of this knowledge of preservation issues and practices was gained from courses and seminars (84% and 72% for archives and libraries respectively), staff study and reading was the next most common source, with conferences the least available (question 10). Another important point was that 59% of the conferences attended by archivists and 49% of the conferences attended by librarians, were held overseas (question 11).

43. There was little evidence of in-house training in libraries and archives (question 12). 67% of archives and 83% of libraries either did not answer this question, or offered no training in-house for professional staff.

Specialist or Technical Staff

44. The general response to this section was low - about 50%. This could be because the people filling in the questionnaire had little or no knowledge of the training of the people working in their binderies and conservation units (questions 14 to 22).

45. The survey determined that the 'average' conservation unit in either an archive or a library contained approximately 1.5 conservators, and 5.5. technicians. Half of the conservators working in institutions participating in the survey had been trained abroad. Most technicians had been trained in their own country, yet not at their present place of employment.

46. Despite the high proportion of people being trained abroad, relatively few countries claimed to have experienced difficulties in adapting this training to the local institution. Those who did have difficulties, ascribed them to the lack of specialist machinery and supplies in their own countries. The problems of supplies and parts have been described above.

HOW THE INSTITUTIONS IN THE SURVEY WOULD LIKE TO SEE THEIR STAFF TRAINED

Professional staff

47. The survey brought out the different attitudes of libraries and archives to the training of professional staff (question 13). Archives saw the most important element of training as the ability to assess a collection and effectively analyse its preservation needs. Libraries, showing again their attitude that conservation is essentially about repair, thought that knowledge of the correct treatment of damaged materials was most important. Both sectors agreed that training in preventive conservation methods and environmental control were next in importance. Neither archives nor libraries gave much prominence to the place of conservation within the whole collection management framework.

Conservation Staff

48. Table 4 shows the type of training institutions would prefer for conservation staff (question 23). There was a high interest in manuscripts and newspapers and in deacidification and traditional repair methods.

49. The survey also enquired about staffing levels, as well as the type of staff in which institutions were interested. Naturally, there was an unanimous demand in both sectors for more staff; but there was also evidence of a desire to alter the balance of skilled and unskilled staff in conservation units. This was most apparent in libraries, where there was a clear desire to have more skilled conservators and fewer technicians. Archives also wanted more skilled workers, but not a decrease in the number of technicians. The same pattern of altering the balance occurred again in binderies and microphotographic units. There seemed to be a severe shortage of skilled staff for photographic work. This is hardly surprising, given the poor state of in-house training throughout the institutions in the survey. Only one organisation (the Central Archival Administration of the USSR) offered any formal training in reprography.

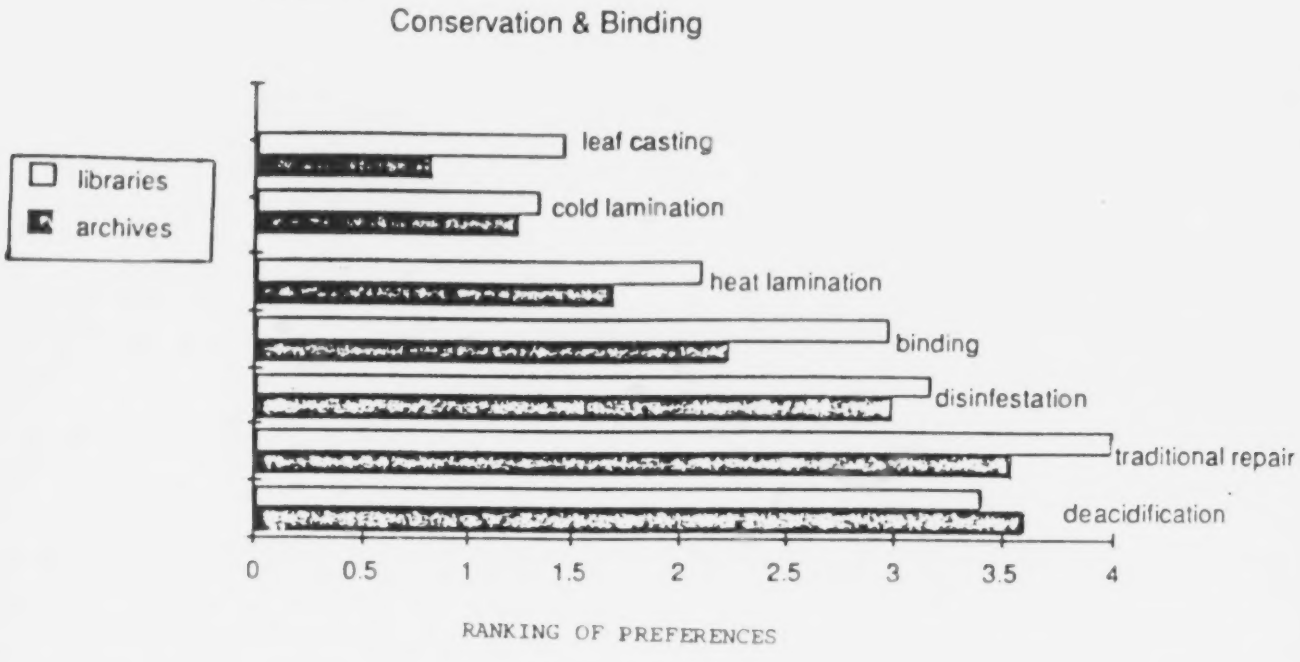
CONCLUSIONS

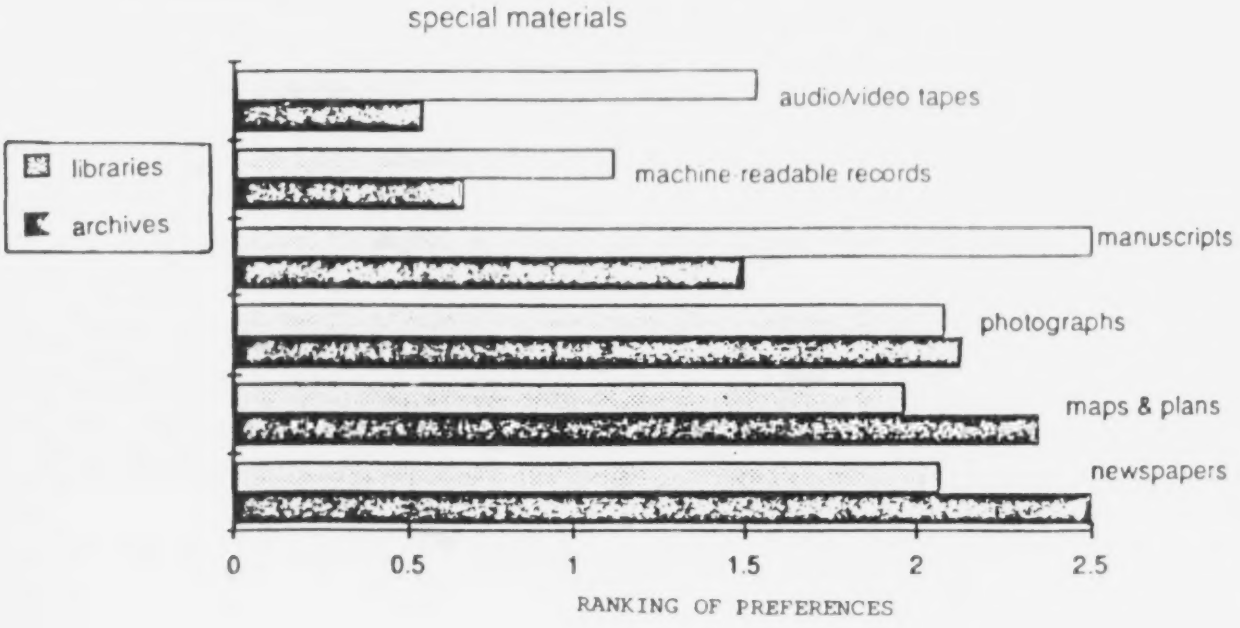
Training Institutions

50. A reasonably high number of courses contained some mention of preservation and conservation but there was still a marked tendency for preservation to be regarded as essential in archive courses while still a comparative luxury in librarianship courses. This was particularly marked in the higher proportion of compulsory or core modules including preservation in archive courses (78%)

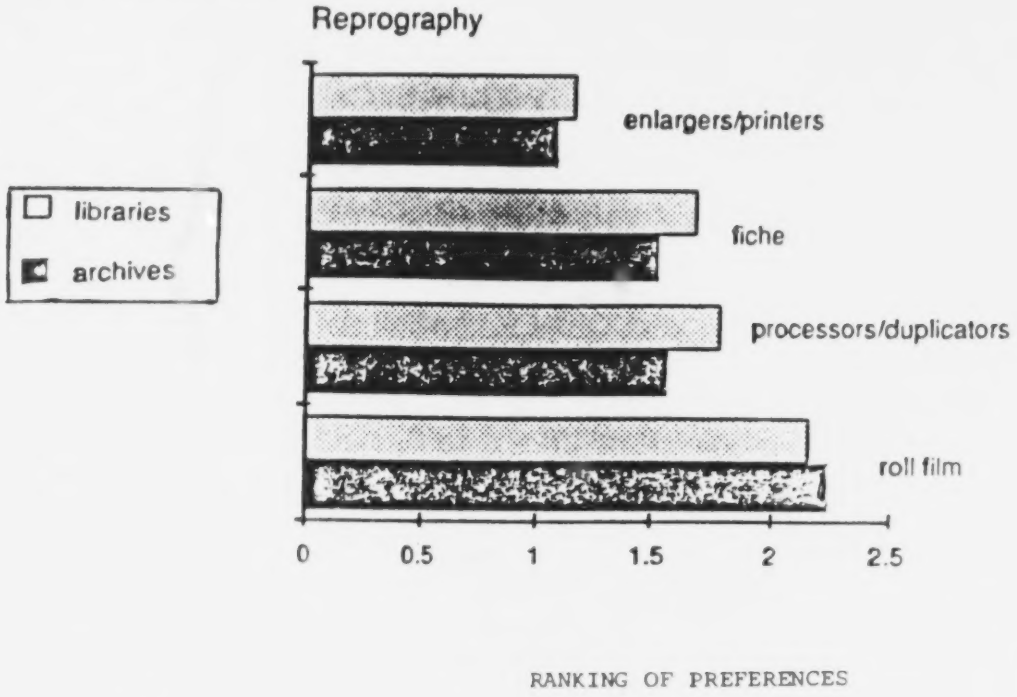
TABLE 4

In what areas would you like conservation staff to be trained?





In what areas would you like your conservation staff to be trained?



compared with librarianship courses (58%).

51. Teaching in general could be considered to be inadequately resourced both in terms of teaching staff and facilities and experience of colleagues visiting overseas schools has demonstrated that theoretical awareness in teaching staff is frequently well ahead of any practical knowledge or activity being undertaken. Some 62% of courses allocated less than 10 hours to preservation and conservation with very few courses providing any instruction in practical repair. Those schools that did devote more time to preservation and conservation were chiefly spending the time providing students with the opportunity to undertake basic repairs or microfilming and this was really more for training technicians rather than skilled conservator training.

52. There was a strong awareness among library and archive schools that further training was needed for staff and would have to be provided by training courses or attachment at overseas institutions.

53. There was no obvious trend for teaching of preservation and conservation to be linked particularly to any specific aspect of library or archive training. This is in contrast to the UK where Feather and Lusher (2) have found a strong move for preservation to be linked to management aspects.

Libraries and Archives

54. With regard to libraries and archives, a review of these institutions suggested that more libraries were housed in purpose-built buildings compared with archives. A large proportion of archives however had plans for new buildings whilst most libraries only had plans to improve their existing accommodation.

55. A majority of both libraries and archives in the survey had a conservation unit, a bindery or reprographic unit and many had all three. The vast majority had adequate basic facilities but half of those with some kind of unit were not satisfied with their specialist equipment. Difficulty in obtaining specialist supplies and parts was a common problem.

56. Libraries seemed to be more aware of the need for framing policies and procedures whereas archives demonstrated an appreciation for all round care of materials. The vast majority of countries did not have a national preservation policy and the policies that did exist referred almost exclusively to archival materials.

57. The average proportion of staff in libraries and archives with any knowledge of preservation issues and practices was extremely low (less than 10%-14%). There was little evidence of in-house training and courses and seminars were the most important means for the dissemination of preservation knowledge most of which took place overseas. Training for conservators and technicians was also limited with developing countries being very dependent on courses being organised in the more developed countries.

DISCUSSION

58. The results of this review have helped to highlight the extent to which preservation and conservation are included within the training of librarians and archivists with most giving a relatively basic level of awareness that needs to be strengthened and expanded. The library and archive schools recognised the needs of their staff for further training in order to train the "trainers".

59. A review of the training needs as seen by employing institutions reveals the very limited levels of in-house training for any kind of professional or non-professional staff and the need currently to rely on overseas training which is limited and costly.

60. To make progress with preservation and conservation, training at several levels is required. A basic appreciation of preservation policies and practices is desirable for all professional staff and the improvement of courses at library and archive schools can meet the needs of new students. Work is being separately undertaken by IFLA and ICA on possible curricula for modules covering preservation and conservation for librarians and archivists and such work needs to be encouraged.

61. Training of non-professional staff in good housekeeping practices etc., is best undertaken in-house but needs professional staff to organise and provide such training in support of their institutions' operations.

62. A major requirement for any library or archive wishing to develop and implement a preservation programme is appropriately trained professional staff to direct and control such programmes and trained conservators with supporting technicians to undertake the treatment required including restoration, conservation and reprographic processes. For both preservation administrators and managers as well as for conservators and technicians it was recognised that in most cases training had to be undertaken at overseas institutions with problems of cost and ability in an appropriate foreign language.

RECOMMENDATIONS

63. There were a number of proposals that could help to meet the training needs identified in this survey and are recommended for consideration.

(a) provision of grants to enable selected staff to obtain full-time professional training overseas in preservation and conservation or training through attachments to institutions in both developing and developed countries. This would provide a core of well trained staff to direct and control preservation programmes in individual institutions

(b) provision of grants to enable selected teachers in library and archive schools to obtain detailed training in preservation and conservation. This serves to educate the future "trainers"

(c) development of training packages, covering specific topics to be held in selected developing countries or regions and directed by special advisers

(d) funding of regional workshops on special issues to be held in selected developing countries and directed by special advisers

(e) funding of workshops or short courses held in developed countries to provide for continuing education and current awareness needs

(f) designating selected existing courses for provision of additional resources to serve as regional centres to which scholarships or grants could be awarded for foreign students

(g) funding one existing programme for 3 to 5 years to act as a regional facility on the lines of (f) above

64. The report identified work currently being undertaken by IFLA and ICA on possible curricula for modules covering preservation and conservation for librarians and archivists. Once outline proposals have been formulated it is recommended that an international seminar be supported to discuss such proposals and review ways of integrating such topics into library and archive school curricula.

65. Training of non-professional staff in good housekeeping practices is required. It is recommended that support be given to formulating guidelines on the content of such training.

66. The review of facilities available to libraries and archives particularly raised the problems of supply of archival quality conservation materials and spare parts for maintenance of specialist equipment. It is recommended that this be the subject of a separate study to review the needs in selected countries and to identify how far local substitutes could be identified or with adaptation provided within that country.

References

1. "Preservation and Conservation of Library and Archival Documents : A UNESCO/IFLA/ICA Enquiry into the Current State of the World's Patrimony". D W G Clements. Edited for UNESCO July 1987. PGI/87/WS/15.

2. "The Teaching of Conservation in Library and Information Science Schools in Great Britain". J Feather and A Lusher. British Library Research Paper 49. 1988.

ANNEX A

QUESTIONNAIRE FOR EDUCATIONAL INSTITUTIONS TEACHING LIBRARIANS AND/OR ARCHIVISTS

This survey is in support of a review of training needs in preservation

Preservation and conservation are defined as including

(a) the preservation planning and policy making functions
(b) the development and application of preventive measures to minimise the effects of those factors that result in the deterioration of library and archive materials
(c) the treatment of documents and other forms of information including restoration, conservation and substitution or transfer to another medium

INSTITUTION

1. (i) Name of instituton

Address

City

Country

Telephone Telex

1.(ii) Name and function of person completing questionnaire

2. Do you provide - librarians YES ☐ NO ☐

courses to train - archivists YES ☐ NO ☐

PLEASE COMPLETE A SEPARATE QUESTIONNAIRE FOR LIBRARIANSHIP AND FOR ARCHIVE COURSES UNLESS CONSERVATION TRAINING FOR THEM IS COMBINED

TEACHING

3. Is there any mention of preservation and conservation (as defined above) in your courses

- undergraduate YES ☐ NO ☐
- postgraduate YES ☐ NO ☐

4. If YES, is this in a core/compulsory or an optional/elective module

- undergraduate CORE ☐ OPTIONAL ☐
- postgraduate CORE ☐ OPTIONAL ☐

CORE/COMPULSORY MODULES

5. (1) If in a core module please state the name of the module
- undergraduate _ _ _ _ _ _ _ _ _ _ _ _ _ _ _
- postgraduate _ _ _ _ _ _ _ _ _ _ _ _ _ _ _

5. (2) Please indicate the time devoted to preservation and conservation within each module both in hours and as a percentage of the total time for that module

5. (3) Please indicate the extent and depth of studies on preservation and conservation which students are expected to undertake outside class time

5. (4) Please list the topics covered in preservation and conservation (If possible please attach copies of curricula or module contents)

5. (5) Please say whether any practical work is undertaken YES ☐ NO ☐
If YES, what facilities are available

5. (6) Are visits arranged to any binderies or workshops YES ☐ NO ☐
If YES. please give brief details

OPTIONAL/ELECTIVE MODULES

6. (1) If in an optional module please state the name of the module

- undergraduate _____

- postgraduate _____

6. (2) Please indicate the time devoted to preservation and conservation within each module both in hours and as a percentage of the total time for that module

6. (3) Please indicate the extent and depth of studies on preservation and conservation which students are expected to undertake outside class time

6. (4) Please list the topics covered in preservation and conservation (If possible please attach copies of curricula or module contents)

6. (5) Please say whether any practical work is undertaken YES ☐ NO ☐
If YES, what facilities are available

6. (6) Are visits arranged to any binderies or workshops YES ☐ NO ☐
If YES, please give brief details

STAFF AND RESEARCH

7. How many staff are involved in teaching preservation and conservation

8. Please list any staff research in preservation and conservation

9. Please list any student projects or research in preservation and conservation with the source of funding if any

10. Are outside speakers involved in the teaching of preservation and conservation YES ☐ NO ☐
If YES, please give frequency and details

11. Are staff involved in short courses or conferences on preservation/conservation

as participants YES ☐ NO ☐

as providers/organisers YES ☐ NO ☐

If YES, please give details

FUTURE REQUIREMENTS

12. If at some future date, preservation and conservation were to be provided in the education of librarians and/or archivists have you any staff with some knowledge of the subject YES ☐ NO ☐

13. What training would be required for these staff

Please return by 15 April 1988 to:-

Dr D W G Clements
The British Library
Great Russell Street
London WC1B 3DG
United Kingdom

ANNEX B

QUESTIONNAIRE FOR LIBRARIES AND ARCHIVES

This survey is in support of a review of training needs in preservation and conservation, which are defined as including :

(a) preservation planning and policy making functions

(b) the development and application of preventive measures to minimise the effects of the deterioration of library and archive materials

(c) the treatment of documents and other forms of information including restoration, conservation and substitution or transfer to another medium.

INSTITUTION

1.1. Name of institution

Address

City

Country

Telephone Telex

1.2. Name and function of person completing questionnaire

TOTAL NUMBER OF STAFF

2. Please give numbers of staff (as full time equivalents) occupying

- professional posts
  - with professional qualifications _____
  - with other academic qualifications _____
  - unqualified _____
- non-professional posts _____

PRESERVATION POLICY

3. Can you give an estimated percentage of your holdings which need some form of preservation

- immediately _____
- within five years _____
- within twenty years _____

4. Approximately what percentage of your annual budget is allocated for conservation, preservation, binding and reprography ?

5. Do you give particular attention to the preservation of non-print media (e.g. photographs, films, sound recordings, machine readable records) ? If so what measures are taken

6. Does your department emphasise preventive measures such as good housekeeping. If so what measures are taken

7. Does your department have a disaster plan

8. Does your country have a national preservation policy ? If so, has any literature been produced describing it

PROFESSIONAL LIBRARY AND ARCHIVES STAFFING AND TRAINING

9. How many staff in professional librarian and archivist posts have any knowledge of or experience in preservation and conservation issues and practices

10. Was this knowledge obtained from

staff study/reading_____ conferences _____

courses/seminars _____ other (please specify)_____

11. If by courses/seminars were these provided

in-house _____ overseas _____

within your country_____ other (please specify)_____

12. If your institution provides in-house training please describe it

13. What topics would you like to see emphasised in the training of your professional staff ? (Please grade your preferences 1, 2, 3 etc., in order of priority)

_____ - conservation objectives in relation to collection management in general

_____ - assessing the condition of an institution's collection and its preservation needs

_____ - relative advantages of preservation options

_____ - preventive measures, including environmental control

_____ - conservation measures for the treatment of different categories of damaged material

_____ - planning for disaster prevention and control

_____ - staff and user education

---------- - other (please specify)

PRESERVATION, CONSERVATION AND REPROGRAPHIC STAFFING AND TRAINING

14. If you have a conservation unit and/or bindery, what is the number of staff trained in conservation and preservation and the level of training (i.e. full courses, short courses, in-house training, apprenticeships) and where were they trained ?

- professional conservators (those able to advise or decide on the appropriate treatment and to direct or supervise the technical staff)

- technicians

15. What is the level of training of the conservation unit manager if there is a manager ?

16. How many staff would you ideally like to train for the conservation unit or bindery and to what level ?

- professionals _____

- technicians _____

Are posts currenty available to employ these numbers

17. If there is a photographic or microphotographic unit, what is the number of staff trained and their level of training ?

18. What is the number of staff you would like to train in photography and microphotography and at what level ?

Are posts currently available to employ this number

19. If any of your staff have received training overseas in conservation, microphotography, etc., have they experienced difficulties in adapting the training to home conditions ? If YES please describe the difficulties

20. If you run in-house training for preservation, conservation or reprographic staff please give details

21. If your staff participate in apprenticeship schemes elsewhere, please describe them

22. Do you or would you accept attachments for conservation staff from other institutions ? For what period would you be prepared to accept them ?

23. In what areas would you like staff to be trained (please grade your preferences 1, 2, 3, etc., within each grouping in order of your priority)

Conservation & Binding

Techniques:

_____ traditional repair

_____ disinfestation

_____ deacidification

_____ heat lamination

_____ cold lamination

_____ leaf casting

_____ binding

_____ other (please specify)

Treatment for special materials:

_____ newspapers

_____ maps & plans

_____ photographs

_____ audio/video tapes

_____ machine-readable records

_____ other (please specify)

Reprography

_____ operating roll-film cameras

_____ operating fiche cameras

_____ operating enlargers/printing

_____ operating film processors/duplicators

24. Are there preservation or conservation training facilities in your country or region ? If so, please list them with addresses

25. If there are no training facilities nationally or regionally, is there a site at which they could be developed ?

If so, what difficulties might there be in achieving this ?

GENERAL FACILITIES

26. Are your collections housed in purpose-built accommodation ? YES ☐ NO ☐

If not, for what purpose was the building constructed ?

27. Is the building air conditioned ? YES ☐ NO ☐

Does the air conditioning work properly and continuously YES ☐ NO ☐

28. What are the major hazards to your holdings ?

heavy use	_____	high temperature/ humidity	_____
insects	_____	fire	_____
rodents	_____	natural disasters	_____
mould	_____	other (please specify)	_____
pollution	_____		

29. Have you plans for future facilities ? If so, give details

PRESERVATION, CONSERVATION AND REPROGRAPHIC FACILITIES

30. Is there a conservation workshop operating in your institution

YES ☐

NO ☐

If yes, please answer the following :

30.1. Are there adequate work surfaces

30.2. Is plumbed in water regularly available

30.3. What equipment is available

30.4. Is all the equipment in the workshop in working order

30.5. Is the equipment adequate for your needs ? If not, what would your priorities be for acquiring more equipment

30.6. Do you have difficulties in obtaining spare parts

30.7. Are there difficulties in obtaining supplies, and if so, which ones

30.8. Do you have facilities for laboratory testing

30.9. Do you use conservation workshop facilities elsewhere ? If so, where

30.10. Can you give an estimate of the quantity of documents or volumes repaired in a year

31. Is there a bindery operating in your institution ?

YES ☐
NO ☐

If yes, please answer the following:

31.1. Is the equipment adequate

31.2. If not what would be your priorities for acquiring more equipment

31.3. Are there problems obtaining supplies or spare parts

31.4 Do you use bindery facilities elsewhere

31.5. Can you give an estimate of the number of volumes bound in a year

32. Is there a photographic or microphotographic processing unit operating in your institution

YES ☐
NO ☐

If yes, please answer the following:

32.1. Is the equipment available adequate

32.2. If not, what would be your priorities for acquiring more equipment

32.3. Are there problems obtaining supplies or spare parts

32.4. Do you use processing facilities elsewhere

32.5. Can you give an estimate of the average number of rolls of microfilm processed in a month

Please return by 30 April to:

Dr D W G Clements
The British Library
Great Russell Street
London WC1B 3DG
United Kingdom.